insights
Strategic Marketing and Research

New Hampshire
visitnh.gov

2017-18 Fall & Winter
Advertising Effectiveness & ROI

June 2018

Background

- The New Hampshire Division of Travel and Tourism Development (DTTD) continues to place seasonal media campaigns targeting leisure travelers. Based on results of previous campaigns, media, markets and creative are continually revised.
- In order to be accountable for the resources invested in these efforts, DTTD has retained Strategic Marketing & Research Insights (SMARInsights) to measure the reach and impact of its marketing for the past three fiscal years. An entire year's worth of media was evaluated in a single measure for the first two research efforts, but for 2017-18 there are two waves of research based on seasonal placements. This is an evaluation of the fall and winter campaigns. A spring and summer measure will be rolled up to understand the impact of the entire fiscal year's marketing.
- The specific objectives of this seasonal awareness research:
  - Measure the reach of the fall and winter advertising among a targeted audience;
  - Evaluate the effectiveness of the Division's marketing through SMARInsights' destination marketing organization (DMO) cost-per-aware household benchmarking;
  - Understand the overlap and potential impact of multiple media;
  - Determine the ability of the creative to communicate desired messages, again using SMARInsights' benchmarking;
  - Assess the ability of the advertising to motivate interest in visiting and increase visitation;
  - Calculate the number of influenced trips, visitor spending, and return on investment of the media campaigns; and
  - Forward insights into future refinement of the marketing.

Methodology

- SMARInsights' advertising effectiveness methodology requires respondents to view the actual advertising in order to gauge awareness, so we developed and programmed an online survey. National sample vendors provided a survey link to potential respondents.
- In order to qualify for the survey, respondents had be travel decision makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents also had to be between the ages of 18 and 65.
- In order to evaluate individual target markets, quotas were established in Toronto, Montreal, Boston, and New York City. The Division's paid media placements have the ability to reach a broader audience throughout the Northeast. So in addition to the spot markets evaluated, interviews were also completed in other markets in Connecticut, Maine, Massachusetts, Rhode Island, Vermont, New Jersey, and New York. Pennsylvania had been considered part of the northeast market in the 2015-16 fiscal year but was eliminated for this fiscal year. The fall campaign also targeted the larger, more distant markets of Charlotte, Chicago, Dallas and Tampa. .
- A total of 1,958 interviews were conducted across the target markets. Upon completion of data collection, the results were cleaned, coded, and weighted to be representative of the population.
- The following report summarizes the results of the survey. The questionnaire and the ads tested appear in the Appendix to this report.

	Completed Interviews
Toronto	277
Montreal	298
Boston	304
New York City	461
Other Northeastern States	304
Fall Targets: Tampa, Chicago, Dallas and Charlotte	314
Total	1958

Campaign Overview

- Spending was slightly lower overall for both fall and winter from the previous fiscal year. However, the spending allocation has changed considerably, especially for fall.
- For the fall 2017 campaign, large distant markets were targeted for the first time, including Charlotte, Chicago and Dallas. So no only was fall spending lower, it was dispersed over broader target.
- The creative placed was again the Limitless campaign under the Live Free brand. Fall creative included digital and paid social, while winter included TV, print, and out-of-home in addition to the digital and paid social.
- A portion of the winter buy was a co-op with Ski New Hampshire.

Spending by Season	2015-16	2016-17	2017-18
Fall	$238,587	$274,099	$266,975
Winter	$358,860	$444,493	$420,916
Total	**$597,447**	**$718,592**	**$687,891**

Spending by Media	Fall	Winter	Total
TV		$104,718	$104,718
Print		$5,000	$5,000
OOH		$89,723	$89,723
Digital	$186,975	$130,375	$317,350
Social	$80,000	$91,100	$171,100
Total	**$266,975**	**$420,916**	**$687,891**

Insights

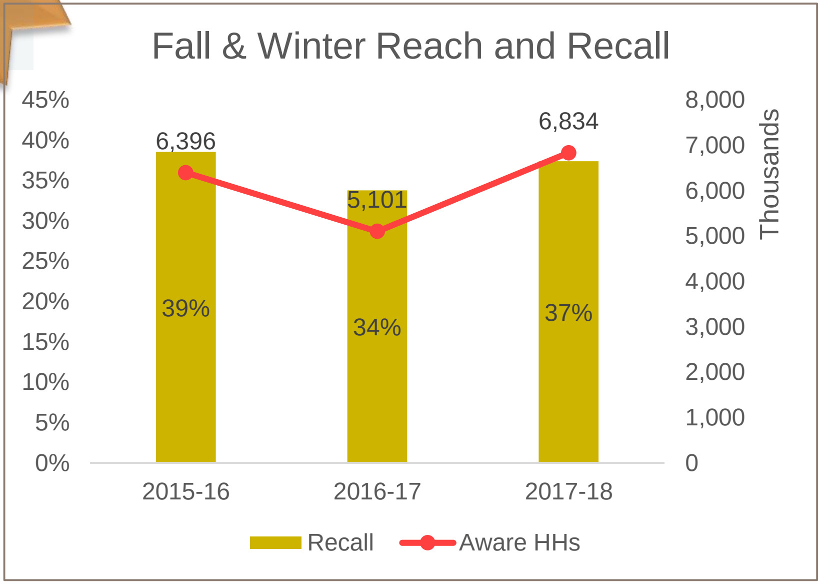
204,568	$185.6 million	$270
Influenced trips	Influenced visitor spending	Return on investment

- The Division influenced more than 200,000 trips to the state for the fall and winter of 2017-18. This generated more than $185 million in influenced visitor spending for a return on investment of $270. This generates an additional $10.3 million in state taxes for New Hampshire.
- While the impact of the entire fiscal year's campaign will be evaluated once 2018 spring and summer travel have concluded, if the spring campaign has similar performance for reach and influence, there would be an increase in total influence for the fiscal year.
- The fall and winter campaigns were able to reach more households with both the expansion of the fall target markets and a sustained presence of the Live Free campaign in previously targeted markets for the past three years. SMARInsights finds destination marketing campaigns are able to build recall through wear-in when creative is deployed for multiple years.
- The campaign has the most influence in the nearby, familiar market of Boston. The campaign made strong strides in Toronto, a market that has struggled to see influence. Given the distance for the additional fall spot markets of Dallas, Chicago, Charlotte and Tampa, consumers here would likely behave similarly to Toronto. The Toronto market is beginning to see substantial influence, but this comes with targeted investment. It will likely take more than paid social posts to these additional fall markets to see more influence.
- The media and placements, especially for the fall campaign, should be evaluated based on the demographics of the seasonal visitors. Although New Hampshire's fall visitors tend to be older, the fall campaign has the strongest reach among a younger, Millennial audience.

MARKETING AWARENESS

Overall Awareness

- With the move to expand the fall target markets, the 2017-18 fall and winter marketing reached more households than the media buy of the previous two years.
- Not only did the fall and winter campaigns have more reach than the previous two years of seasonal efforts, but the expanded buy also was able to reach more households than the entire 2016-17 fiscal year's media, which included the far larger spring and summer investment.
- The growth in recall is likely attributable to sustained media placements in those markets targeted in previous years. SMARInsights finds destination marketing campaigns are able to build recall through wear-in when creative is deployed for multiple years.
- With an expanded reach and minimal investment, the fall and winter buy is considered very efficient. Through the evaluation of hundreds of DMO campaigns, SMARInsights has set benchmarks for campaigns' cost per aware household. For campaigns attempting to reach spot market audiences, the average cost per aware household for state DMOs is $0.67. The more efficient the campaign, the lower the cost per aware household.

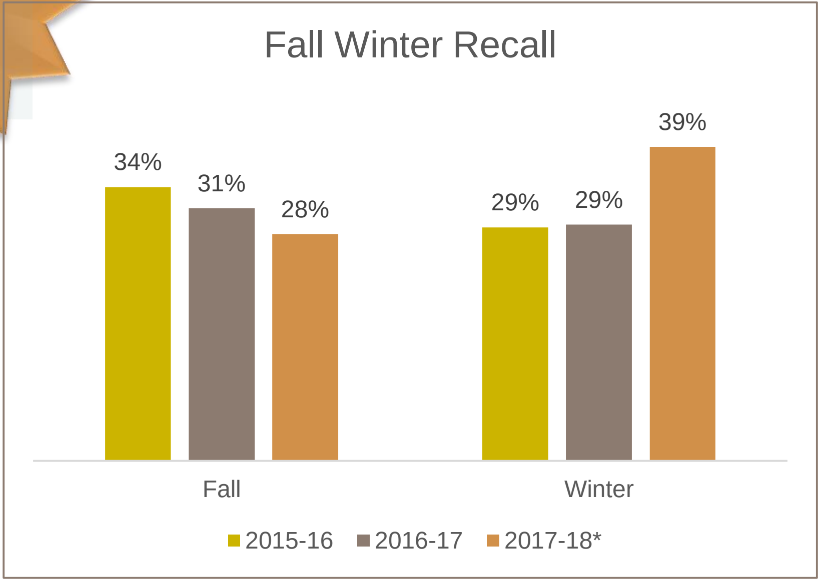


Fall/Winter Recall	2015-16	2016-17	2017-18
Recall	39%	34%	37%
Aware HHs	6,395,952	5,101,438	6,796,422
Media Spending	$597,447	$718,592	$687,891
Cost per Aware HH	$0.09	$0.14	$0.10

Overall Awareness

SMARInsights' spot market benchmark: $0.67 per aware household

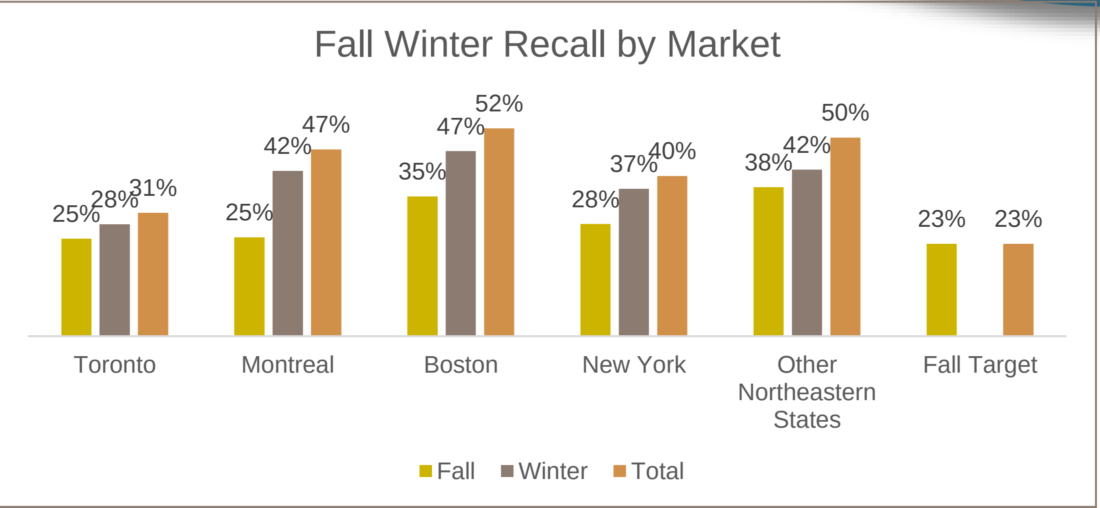
- There was a significant jump in recall of the winter campaign. The markets targeted for this seasonal effort have remained constant, allowing for wear-in of the creative.
- Although the *percentage* of recall for the winter campaign is significantly higher than fall, the number of households reached is about the same for both campaigns. This is because far more households were targets for the fall media.
- Similarly, although the *percentage* of recall for the fall campaign fell, there were significantly more households targeted with the inclusion of some very large markets: Chicago, Houston, Charlotte and Tampa. So although the percentage of recall for the fall media fell, the number of households it reached increased to 5.2 million from 4.4 in 2016.

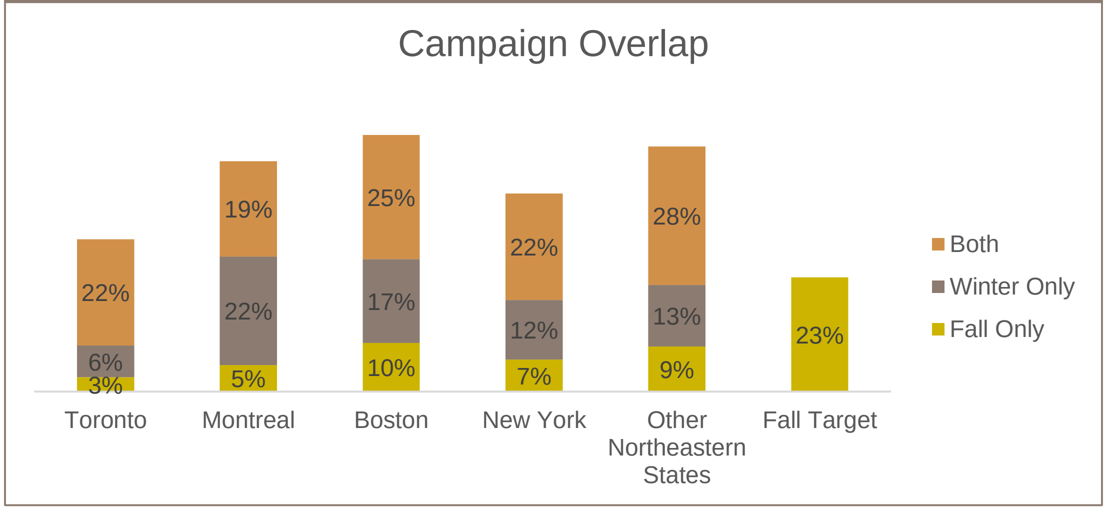


	Fall	Winter
Targeted HHs	18,270,009	13,596,329
Recall	28%	39%
Aware HHs	5,185,047	5,290,859
Media Spending	$266,975	$420,916
Cost per Aware Household	$0.05	$0.08

Media Overlap

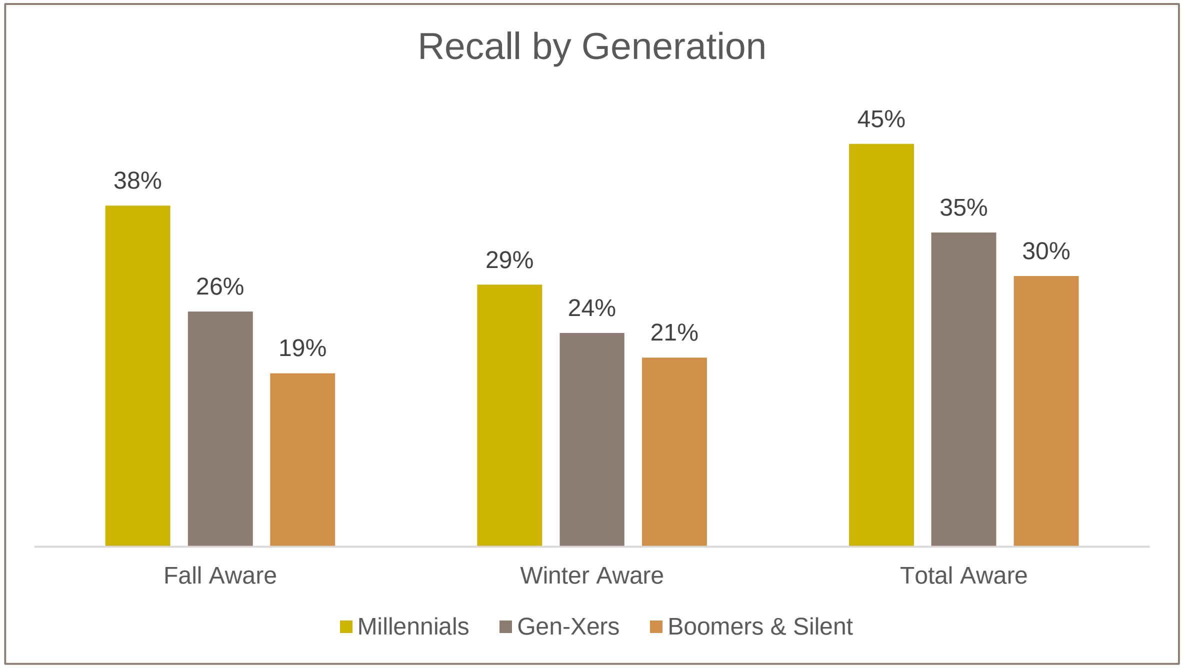
- Most of the markets targeted for fall and winter media received both campaigns. While recall of the winter campaign is higher in these markets, there is also significant overlap between the two campaigns. SMARInsights has seen that exposure to multiple messages helps build interest in and visitation to destinations.
- While this is only an evaluation of the fall and winter reach, the markets targeted for these two campaigns also receive spring and summer media, likely increasing the overlap of New Hampshire messaging even further.





Recall by Generation

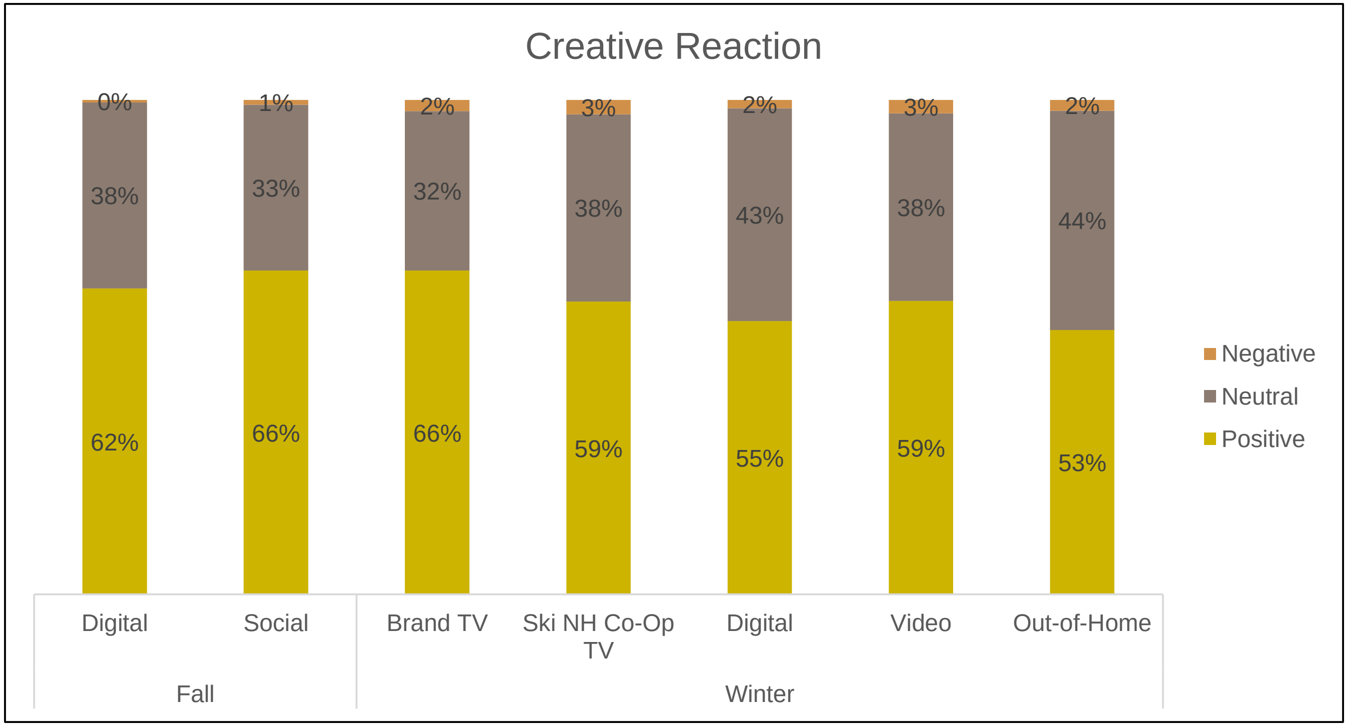
- Younger audiences have higher rates of engagement with digital and social channels. Correspondingly, recall is highest among Millennials for both the fall and winter buy given much of the investment is allocated to digital and paid social.



CREATIVE REVIEW

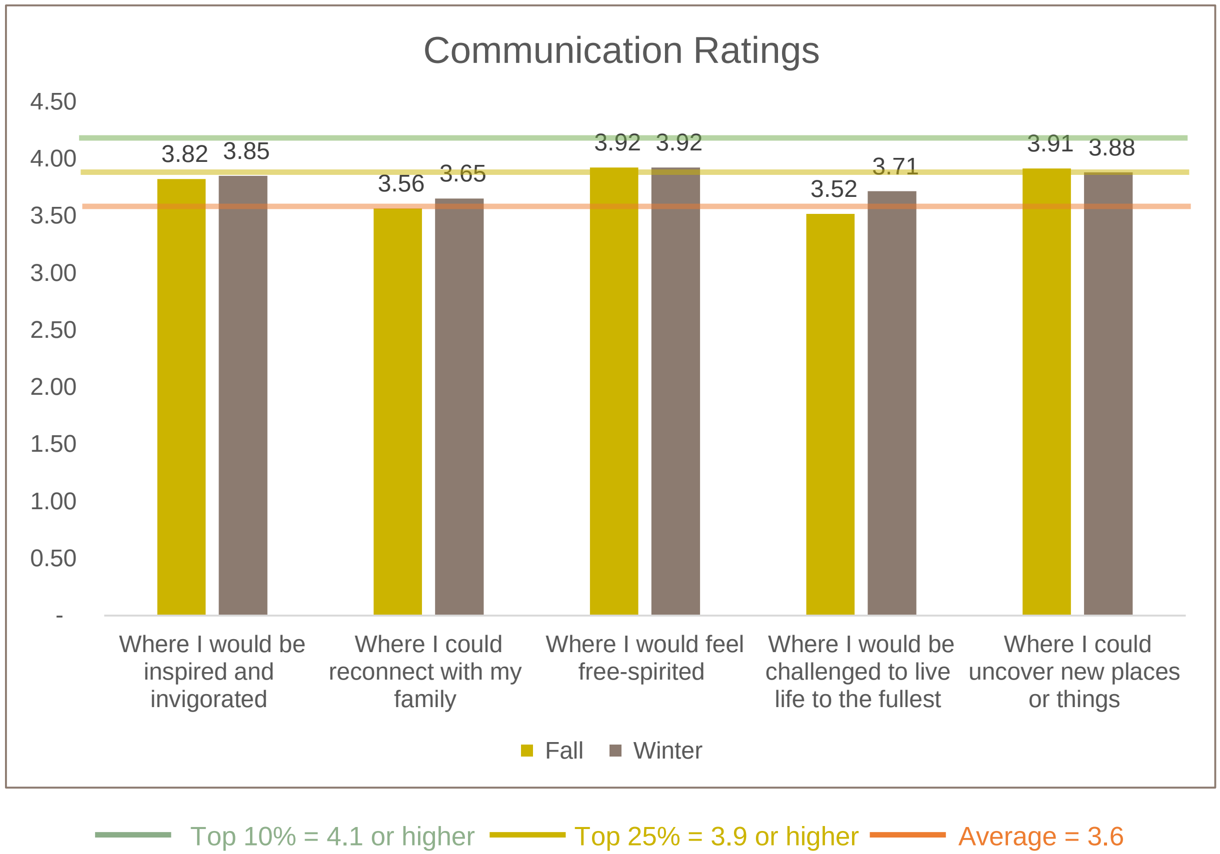
Creative Reaction

- While the goal for destination marketing creative is to communicate messages designed to impact the image of and interest in the state or city, how consumers perceive the marketing can be relevant to recall. SMARInsights often sees marketing that generates a more positive reaction from consumers often also has a higher rate of recall. While consumers are generally positive about the New Hampshire creative, skiing is a niche product, so the winter campaign has a less positive reaction overall.



Communication Attributes

- Although the winter creative features more niche product, the campaign performs slightly better than fall for communicating New Hampshire’s desired messages.
- SMARInsights has developed benchmarks for DMO creative based on the evaluation of hundreds of campaigns. The campaigns are performing in the top 25% of all DMO creative for making consumers “feel free spirited” and “uncover new places or things.”
- The fall and winter creative receive the lowest ratings for being a place to “reconnect with my family.”



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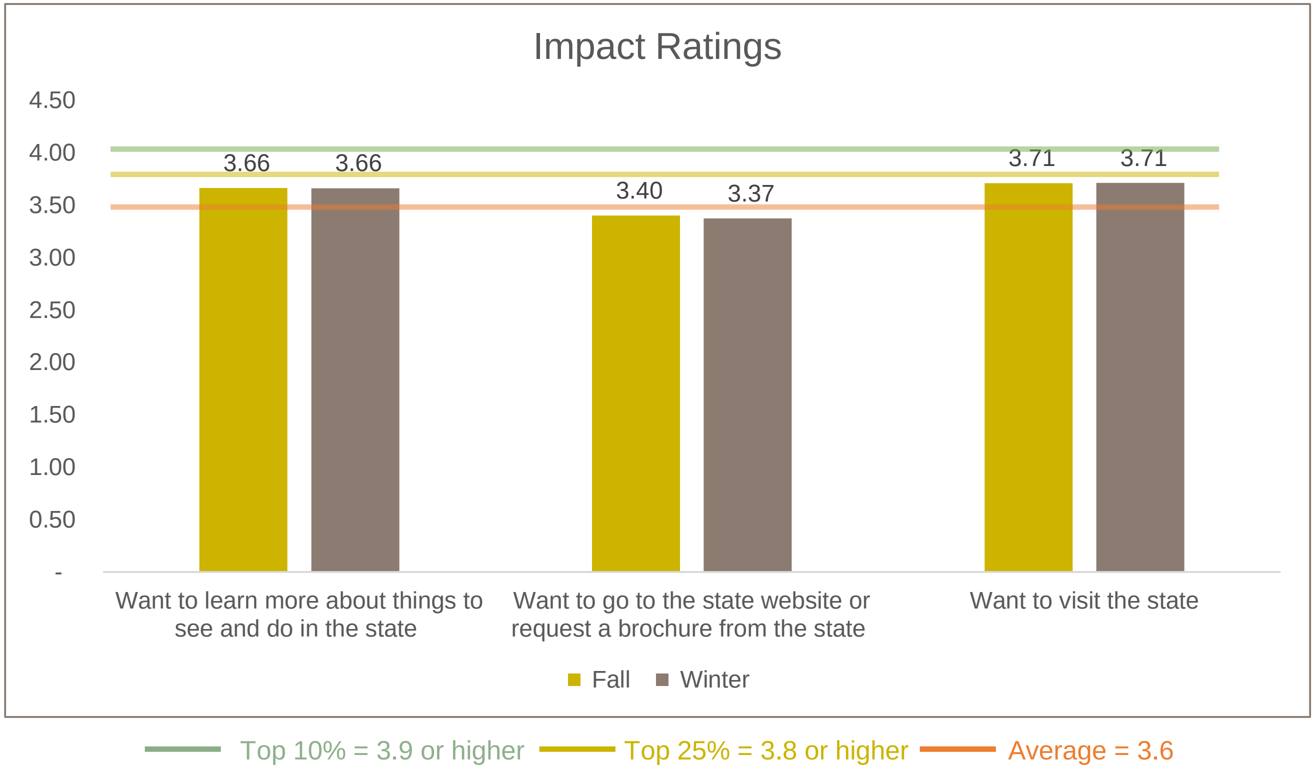
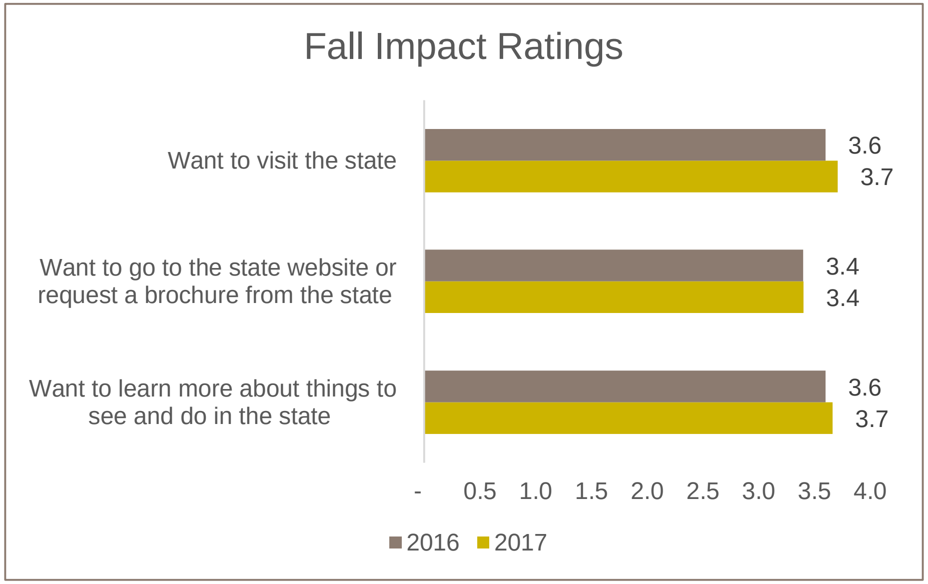
Impact Attributes

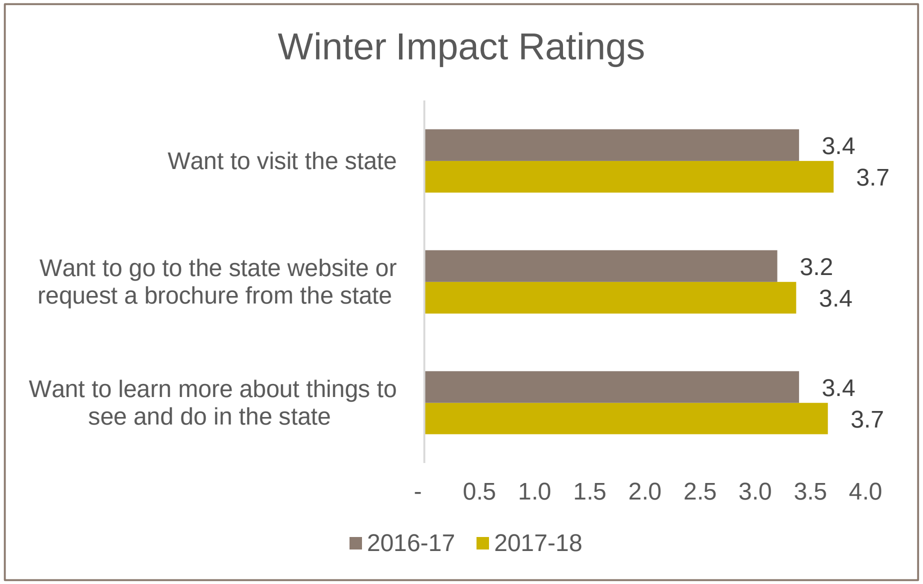
- Impact ratings have slightly different benchmarks as they require an action from the consumer, which is far more difficult to achieve than just communicating a desired message. For these, making consumers want to find out more and visit garner above average ratings. And while ski product is a niche, the winter campaign performs just as well as fall, with broader-appeal product.



Impact Ratings by Season

- Impact ratings for both the fall and winter campaigns improved from the previous year, with significant gains for the winter campaign. SMARInsights often finds niche product has more narrow appeal which can depress creative ratings. Because of this, it is especially encouraging that the winter campaign receives above-average impact ratings.

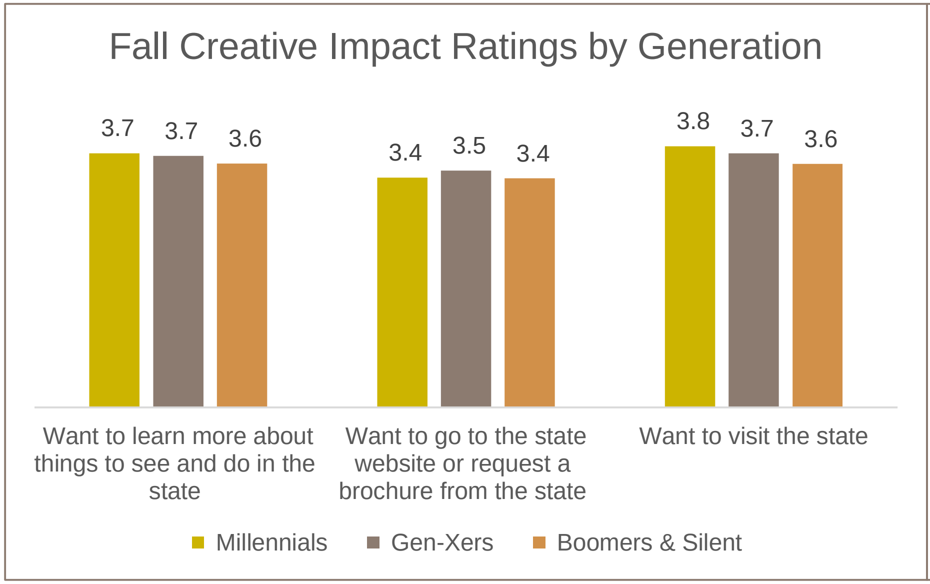


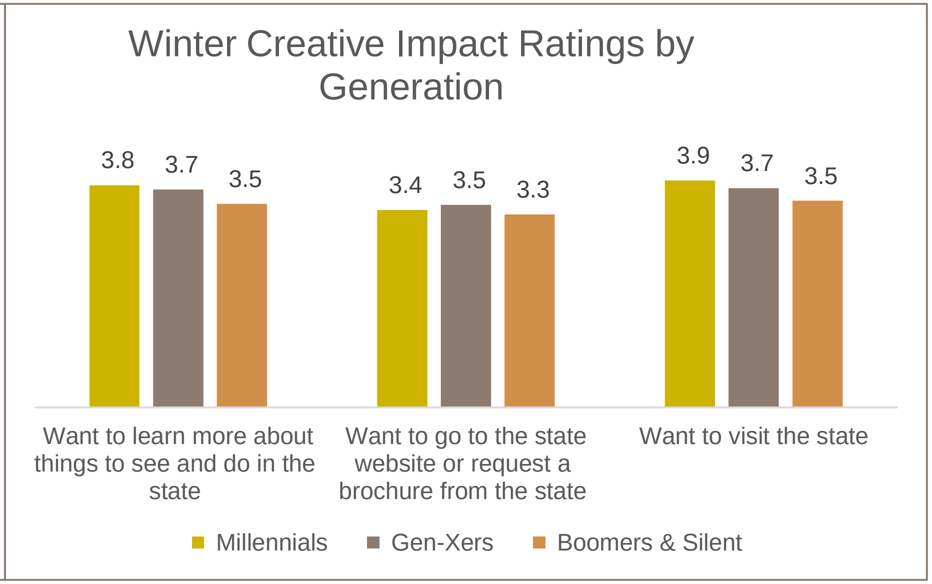


Top 10% = 3.9 or higher Top 25% = 3.8 or higher Average = 3.6

Impact Ratings by Generation

- Not only do younger generations have more recall of the fall and winter marketing, but they also give the campaigns higher ratings. There is less variance for the fall creative



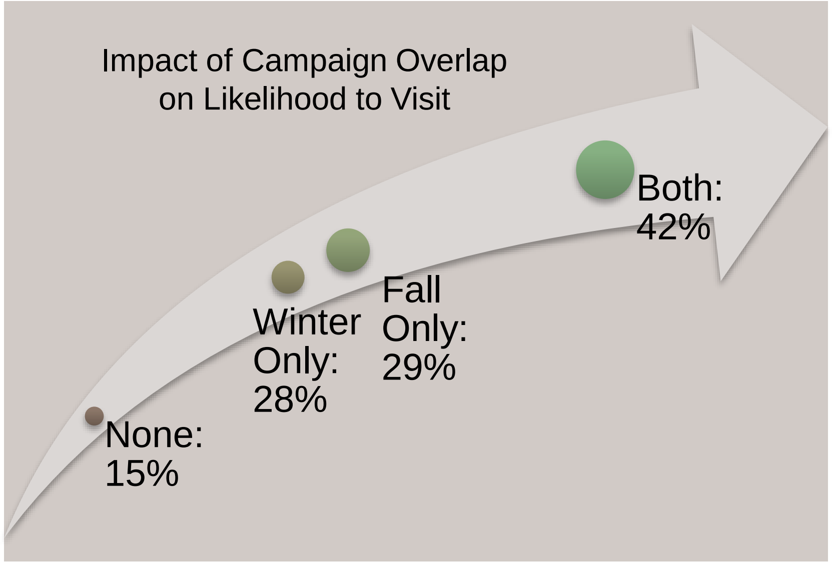


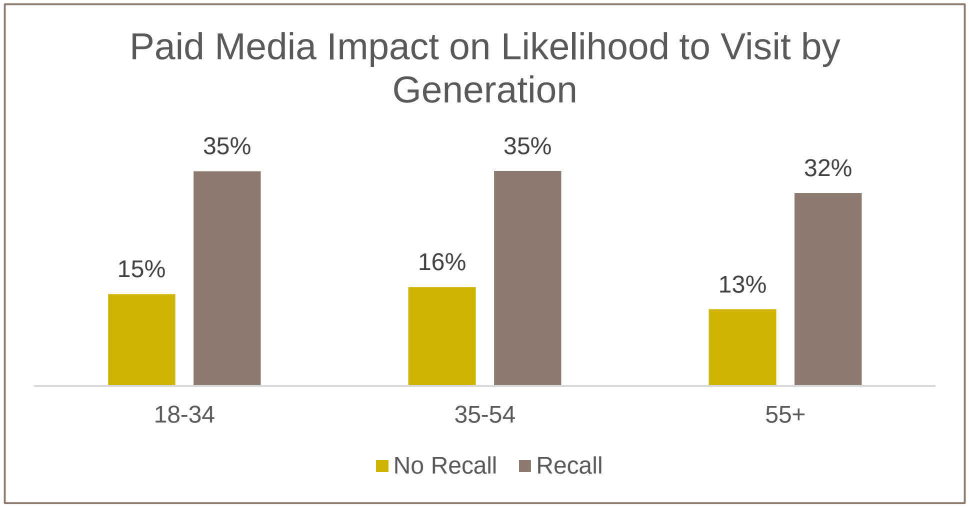
Top 10% = 3.9 or higher Top 25% = 3.8 or higher Average = 3.6

IMPACT OF THE ADVERTISING

Impact on Likelihood to Visit

- Recall of either the fall or winter creative positively influences interest in visiting – with each having a similar impact as a stand-alone campaign. However, when consumers see both the fall and winter creative, they are significantly more interested in visiting New Hampshire.
- The potential influence is consistent across generations, with each potentially experiencing a similar level of lift from the fall and winter media buys.





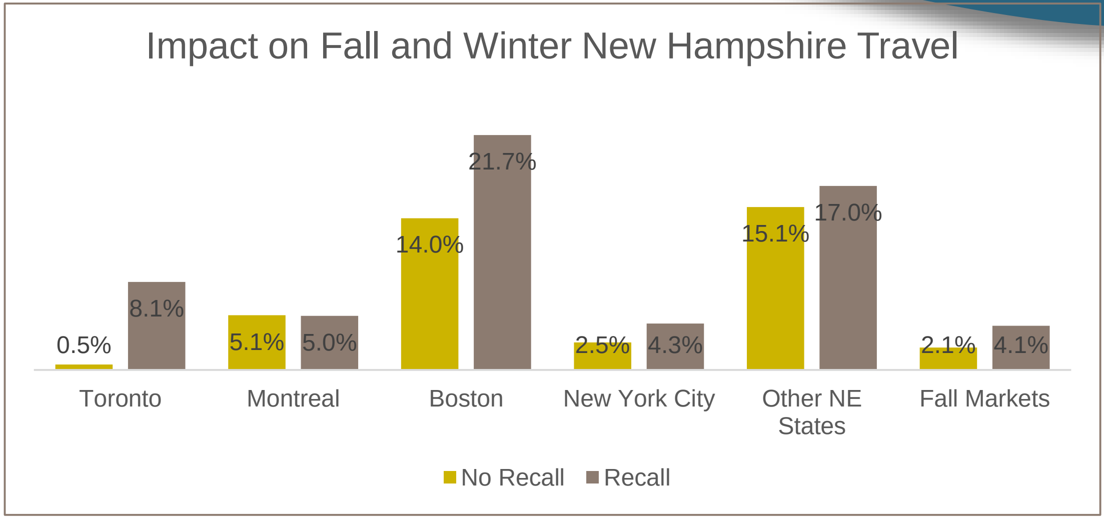
*Likelihood defined as 100% of households "already planning a trip" + 80% "very likely" to visit + 20% "somewhat likely" to visit

Incremental Travel

- While likelihood to visit is a good indicator for future performance of the campaign, it is the number of trips that the campaign is able to generate on which the effectiveness of the advertising is measured.
- SMARInsights' methodology for measuring the impact of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to New Hampshire even without any paid advertising. Thus not all visitation, or even visitation by aware households, is attributable to the ads. In this evaluation, the level of travel among *unaware* households is considered the base and what the state would see without the marketing campaign. Accordingly, any travel above that base by *aware* households is what is considered influenced. As such, this is a very conservative measure of influence.

Impact of the Advertising on Travel

- Overall, the fall and winter media generated more than 200,000 trips to New Hampshire between September 2017 and April 2018.
- Most of these influenced trips are out of the nearby Boston market, where New Hampshire places the most targeted media, including out-of-home.
- This is followed by Toronto, a market that for the past two fiscal years has had the fewest influenced trips and one of the highest costs to generate a trip. However, it is possible that a sustained presence in the market for the past three fall and winter seasons is now coming to fruition here.



	Toronto	Montreal	Boston	New York City	Other NE States	Fall Markets	Total
Aware HHs	525,218	571,801	975,020	1,914,784	1,801,551	1,008,049	6,796,422
Incremental Travel	7.6%	0.0%	7.7%	1.8%	2.0%	2.0%	3.0%
Influenced Fall or Winter Trips	40,000	0	74,975	33,616	35,464	20,513	204,568

- Just as it has taken time to influence Toronto, it will likely take a sustained, more targeted investment in the new fall markets to have much impact. Given the distance for the additional fall spot markets of Dallas, Chicago, Charlotte and Tampa, consumers here would likely behave similarly to Toronto. The Toronto market is beginning to see substantial influence, but this comes with targeted investment. It will likely take more than paid social posts to these additional fall markets to see additional influence.

Return on Investment

- Good incremental travel could be attributable to the lack of snowfall in Western states. Consumers in New York and other Northeastern states who may be willing to travel farther for ski product could have decided to stay in the Northeast given the level of snowfall.
- Previous measurements of the fall and winter campaigns have been lumped together with the spring and summer media. In its first year as a stand-alone evaluation, the off-season campaigns generated more than $185 million in influenced visitor spending.
- Given the level of investment, $270 in visitor spending was returned for every $1 spent on media. This is higher than the industry average of $179 for state DMO campaigns. It is also higher than the ROI for the previous two fiscal years of $222 and $146 in 2015-16 and 2016-17, respectively. The influence of the 2018 spring/summer media buy will be combined with this measure for a comparable fiscal year impact.

	2017-18 Fall & Winter Influence
Influenced Fall & Winter Trips	204,568
Aware Trip Spending	$907
Influenced Trip Spending	$185,578,461
Media Spending	$687,891
ROI	$270

Tax Return on Investment

- Of the influenced visitor spending, only a portion is subject to tax. New Hampshire has no sales tax on goods and services, so not all visitor expenditures are subject to tax. Only those related to lodging, meals, and transportation are taxed.
- Based on the spending on the taxable categories of lodging, meals and transportation, approximately $10 million is returned to the state in taxes from the influenced trips between September 2017 and April 2018. Given the investment in paid media for the fiscal year, this returns $15 to the state for every $1 invested. Not only is this higher than the previous two fiscal years' tax ROI, it is also higher than the industry average for taxes returned. This is especially notable given New Hampshire's tax structure is much more conservative than other competitors.

	2016-17 Fall and Winter Influence
Influenced Trips	204,568
Taxable Spending	$562
Total Influenced Taxable Spending	$114,980,198
Taxes Generated	$10,348,218
Tax ROI	$15

TRIP SPECIFICS

Fall Trip Specifics

- The number of nights and people in the travel party fell slightly for the fall of 2017. Correspondingly, there was also a decline in overall fall trip spending.
- As seen previously, younger audiences have the most recall of fall paid media. However, Gen-Xers and Boomers and older are more likely to visit during the fall. Given this, a review of both media and placements for fall would likely be a good exercise.

Trip Specifics	2015 Fall Trips	2016 Fall Trips	2017 Fall Trips
Nights in New Hampshire	2.6	2.9	2.3
People in your travel party	3.2	3.9	2.6
Kids on trip	30%	21%	27%
Staying with friends and family	24%	23%	20%
Average spending	$839	$720	$715
Per person/per day spending	$103	$63	$118
Income			
Less than $50,000	14%	29%	22%
$50,000 but less than $75,000	38%	25%	23%
$75,000 but less than $100,000	18%	16%	24%
$100,000 but less than $150,000	18%	20%	19%
$150,000 and up	12%	10%	12%
Age			
Millennials (25-34)	32%	33%	28%
Gen Xers (35-54)	27%	37%	37%
Boomers (55+)	41%	29%	35%

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Winter Trip Specifics

- While there is more winter travel by Millennials than in the fall, Gen-Xers again make up the biggest share of winter New Hampshire visitors. Given rates of online and social activity, the placements for winter are likely on target but the placements could use a review to reach more 35- to 54-year-olds.
- Just as in fall, although travel party and number of nights declined, winter spending increased.

Trip Specifics	2015/ 2016 Winter Trips	2016/2017 Winter Trips	2017/2018 Winter Trips
Nights in New Hampshire	2.8	3.2	2.7
People in your travel party	3.0	3.2	3.0
Kids on trip	45%	38%	33%
Staying with friends and family	19%	22%	21%
Average spending	$1,140	$1,000	$1,039
Per person/per day spending	$138	$100	$131
Income			
Less than $50,000	17%	22%	24%
$50,000 but less than $75,000	19%	9%	20%
$75,000 but less than $100,000	24%	16%	20%
$100,000 but less than $150,000	28%	24%	17%
$150,000 and up	12%	31%	19%
Age			
Millennials (25-34)	49%	23%	34%
Gen Xers (35-54)	30%	55%	42%
Boomers (55+)	21%	22%	24%

Trip Activities

- While there are seasonal differences in what consumers do on their New Hampshire trips, the primary activities they participate in and motivate them to visit are unchanged from season to season.
- The trip activities that generate some of the highest rates of participation and motivation include shopping, hiking and visiting parks and historic sites. Rarely does SMARInsights see shopping as a trip motivator, but given the lack of sales tax in New Hampshire, it can be a trip driver.
- Fall and winter visits do vary by the other activities that consumers participate in and motivate them to visit.

Fall & Winter motivators


Shopping


Hiking & backpacking


State & national parks


Historic sites

Fall motivators


Scenic drives


Museums


Festivals

Winter motivators


Skiing & snowboarding


Local restaurants


Plays & concerts

Demographics

- The demographic difference between who the media is reaching and who is visiting is farthest apart for the fall. Again, given the higher rate of travel by older audiences in fall, not only should placements be evaluated but also media used. There is lower penetration of online time and social media usage by Boomers and the Silent generation but this is the only media used for fall targeting.

	18-34	35-54	55+	Married	Kids in HH	High school or some college	College grad or higher	Under $50K	$50K-$100K	Over $100K
Fall										
Aware HHs	44%	35%	21%	55%	41%	34%	66%	26%	44%	30%
Visitors	28%	37%	35%	61%	33%	32%	68%	22%	47%	31%
Winter										
Aware HHs	39%	36%	25%	56%	36%	31%	69%	25%	40%	35%
Visitors	34%	42%	24%	56%	38%	29%	71%	24%	40%	35%

Questionnaire

APPENDIX

Questionnaire

New Hampshire Tourism
Ad Awareness and ROI
April 2018

IP. What is your postal/ZIP code? _______

These are the screeners to identify leisure travel decision makers.

S1. Please indicate which of the following describe you. Select all that apply.

ROTATE	Yes	No
I regularly use social media like Facebook, Twitter or Instagram	☐	☐
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home (IF =0, TERMINATE AFTER SCREENING QUESTIONS)	☐	☐
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy	☐	☐
I use video streaming services like Hulu or Netflix	☐	☐

S2. Who in your household is primarily responsible for making decisions concerning travel destinations?
1. Me
2. Me and my spouse/partner
3. My spouse/partner → TERMINATE
4. Someone else → TERMINATE

AGE. What is your age? __________ [TERMINATE under 18 - over 65]

Questions 1-5 will be used to evaluate the impact of the advertising on top-of-mind recall, familiarity and travel.

1. Thinking about places to go for domestic leisure trips, what STATES come to mind as good places to go? (USE DROP DOWN LISTS)
   STATE #1___________
   STATE #2___________
   STATE #3___________
   STATE #4___________
   STATE #5___________

2. How familiar are you with each of the following states, in terms of what it has to offer as a place for a leisure trip or vacation?

[ROTATE]	Not at all familiar	Not very familiar	Somewhat familiar	Very familiar
New Hampshire				
Connecticut				
New York				
Maine				
Massachusetts				
Rhode Island				
Vermont				

1

3. How likely are you to take a leisure trip to any of the following states in the next year?

[ROTATE]	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
New Hampshire					
Connecticut					
New York					
Maine					
Massachusetts					
Rhode Island					
Vermont					

4. Which of the following states would you prefer to visit for a leisure trip within the next year? **Please select only one.** [ROTATE]

New Hampshire	
Connecticut	
New York	
Maine	
Massachusetts	
Rhode Island	
Vermont	

5. Have you visited any of the following states since September 2017 for a leisure trip? How many trips did you take in each state since September 2017?

[ROTATE]	States visited since September 2017 (check all that apply)	Number of visits since September 2017
New Hampshire		
Connecticut		
New York		
Maine		
Massachusetts		
Rhode Island		
Vermont		
None of these		

Questions6-8 will be used to evaluate the impact of the advertising on information gathering and image of New Hampshire.

6. In the course of planning for any recent or upcoming trips to New Hampshire, have you gathered information in any of the following ways?
   1. Requested a New Hampshire Visitor's Guide
   2. Visited the New Hampshire Tourism site, www.visitnh.gov
   3. Visited the Visit New Hampshire Facebook page
   4. Followed Visit New Hampshire on Twitter
   5. Followed Visit New Hampshire on Instagram
   6. Requested information about a New Hampshire trip in another way
   7. Received e-newsletter
   8. None of these

2

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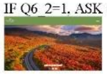
Questionnaire

IF Q6_2=1, ASK Q7



Q7. Is this the New Hampshire website you visited?
1. Yes
0. No

IF 6_3=1, ASK Q7A

Q7a. Is this the New Hampshire Facebook page you accessed?
1. Yes
0. No

[MASSACHUSETTS AND BOSTON DMA ONLY]
IF 6_3=7, ASK Q7B

eNewsletters

Yankee Magazine.jpg

Q7b. Is this similar to the New Hampshire e-newsletter you received?
1. Yes
0. No

8. Please consider the following descriptions that could be used to describe travel destinations, and indicate how much you agree each statement describes New Hampshire.

HAVE THEM RATE NEW HAMPSHIRE IF AT LEAST SOMEWHAT FAMILIAR AT Q2

[ROTATE]	Strongly disagree	2	3	4	Strongly agree
Is a fun and exciting place					
Always has something new to discover					
Is a good place to live and work					
Is beautiful					
Offers an attractive lifestyle					
Is rich in culture and the arts					
Is a good place for culinary activities, including U-pick farms and beer/wine trails					
Has great parks					
Offers lots of outdoor recreation					
Is safe					
Is a kid-friendly vacation destination					
Is easy to get to					
Is unique because of the variety of destinations and activities it offers vacationers					
Has interesting historical sites and museums					
Is a great place for winter sports such as skiing and snowmobiling					
Is a place I would be excited to visit for a leisure trip					
Is a good place for shopping					
Is a great place to vacation when traveling with children					
Offers great vacations for people like me					
Is affordable					
Is a good place for fairs and festivals					
Is a good place to go to the beach					
Is a good place for water activities					

(IF Q5 IS NOT NEW HAMPSHIRE SKIP TO AD SECTION)
Now, please give us some information about the trip(s) you took to New Hampshire since September 2017.

Questions 9-23 will be used to understand New Hampshire trips, including party composition, trip activities and spending.

9. When since September 2017 did you visit New Hampshire for a leisure trip? (ACCEPT MULTIPLES)

9. September 2017
10.......... October 2017
11.......... November 2017
12.......... December 2017
1............ January 2018
2............ February 2018
3............ March 2018
4............... April 2018

Now we'd like to ask you some questions about your most recent trip to New Hampshire.

10_1. How many nights did you spend in New Hampshire during this trip? ______

New Hampshire
visitnh.gov

Questionnaire

10_2. Including you, how many people were in your travel party? _______

ASK Q10b if Q10_2 >1
10b. Of those, how many were children under age 18? _______

10c. What forms of lodging did you use during your trip? Select all that apply.

Luxury resort hotel	
High-end full-service hotel	
Mid-level hotel	
Budget hotel or motel	
Bed and breakfast/Inn	
Airbnb	
Camping/RVing	
Home of family or friends	
Vacation home	
Other	

11. Which of the following activities did you participate in during your trip to New Hampshire? Select all that apply. [ROTATE]

Hiking or backpacking		Wildlife watching	
Visiting a state or national park		Bird watching	
Bicycling or mountain biking		Scenic drive	
ATVing		Sightseeing tour	
Rock climbing		Golfing	
Horseback riding		Shopping	
Hunting		Dining at locally owned restaurants	
Camping		Visiting a noteworthy bar or nightclub	
Snow skiing or snowboarding		Farm to table dinner	
Snowmobiling		Winery tours	
		Beer trail	
Fishing		Farmer's markets/U-picks/roadside stand	
Visiting museums		Canoeing or kayaking	
Attend a play or concert		Boating	
Attending a festival or fair		Dogsledding	
Attending performing arts (music/theater)		Cross country skiing	
Visiting historical sites		Ice fishing	
Snowshoeing		Other, please specify ________	
Ice Skating		None of these	

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

12. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip to New Hampshire. You may choose up to 3.

INSERT NEW HAMPSHIRE REGIONS MAP

13. Which of the following regions did you visit during your trip?

14. Thinking about your overall travel experience in New Hampshire on your most recent trip, would you say it was…?
    5. Excellent
    4. Very good
    3. Good
    2. Fair
    1. Poor

5

15. When you think of your most recent trip to New Hampshire, what thoughts, feelings or emotions come to mind? ______________________________

16. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in New Hampshire on your most recent trip. Please estimate how much your travel party spent in total on...

Please complete all fields – best estimate is fine. If no expenditures in a category enter a "0"

Lodging/Accommodations _______
Meals/Food/Groceries _______
Entertainment/Attractions _______
Shopping _______
Entertainment such as shows, theater or concerts _______
Transportation to New Hampshire _______
Transportation within New Hampshire _______
Other _______

17. Thinking about this trip, how far in advance did you begin to plan?
    1…Less than 1 week
    2…1 to 2 weeks
    3…2 to 3 weeks
    4…3 to 4 weeks
    5…1 to 2 months
    6…3 to 4 months
    7…More than 4 months in advance
    8…Don't know

18. Did you post any information about this trip on the following outlets? Select all that apply.
    1. Facebook
    2. Twitter
    3. Flickr
    4. YouTube
    5. Blogs
    6. Instagram
    7. Pinterest
    8. None of these

23. How likely are you to recommend a trip to New Hampshire?
    1. Very likely
    2. Somewhat likely
    3. Not likely

Questions 24-27 will be used to measure recall of New Hampshire advertising.

24. Have you seen any advertising for New Hampshire as a travel destination?
    1. Yes → ASK 24A
    0. No

24a. What do you recall about the ads? __________

6

Questionnaire

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

ROTATE SEASONS

Fall 2017 Ads
DIGITAL
Fall 2017

DRIVE-banner_300x250.jpg

generic-banner_300x50-2.jpg

HIKE-banner_300x250.jpg

PYO-banner_300x250.jpg

Shopping_AD_300x250.png

FallDigital. Please indicate if you have seen each of these online ads before.e.
Yes
No

FallDigitalB. What is your reaction to these ads?
1. Positive
2. Neutral
3. Negative – ASK FallDigitalC

FallDigitalC. Why do you feel that way? __________

Fall 2017

		
Dark Post – Best Fall Hikes.png	Dark Post – Scenic Drives.png	Fall Activites Carousel (2_2).png

		
Fall Activities Carousel (1_2).png	Fan Growth.png	Leisure Activities Carousel .png

FallSocial. Please indicate if you have seen each of these ads before.

FallSocialB. What is your reaction to these ads?
1. Positive
2. Neutral
3. Negative – ASK FallSocialC

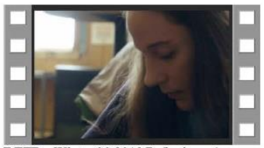
FallSocialC. Why do you feel that way? __________

Winter 2018 Ads – DO NOT SHOW IN FALL MARKETS: TAMPA, CHICAGO, CHARLOTTE AND DALLAS
TV


DTTD_Winter_30_FINAL.mp4
https://youtu.be/xQCftTiatoY

Strategic Marketing and Research

Questionnaire



DTTD - Winter 30 2018 Refresh.mp4
https://youtu.be/6rFb4X3Olcs

ASK TV SERIES FOR EACH SPOT
WinterTV. How many times have you seen this or a similar ad for New Hampshire?
- ☐ More than three times
- ☐ Two or three times
- ☐ Once
- ☐ Never

ASK FOR EACH AWARE
WinterTVA. Where do you recall seeing the ad? Select all that apply.
1. On TV
2. Online
3. Don't recall

ASK FOR EACH VIDEO
WinterTVB. What is your reaction to this ad?
1. Positive
2. Neutral
3. Negative – ASK WinterTVC

WinterTVC. Why do you feel that way? __________

Digital Ads

	
CANADA ONLY Shopping.jpg	Mobile.jpg

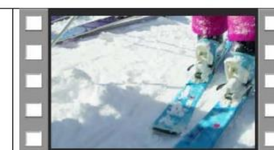
			
Skiing.jpg	Snowshoeing.jpg	Snowmobiling.jpg	

WinterDigital. Please indicate if you have seen each of these online ads before.

WinterDigitalB. What is your reaction to these ads?
1. Positive
2. Neutral
3. Negative – ASK WinterDigitalC

WinterDigitalC. Why do you feel that way? __________

Digital Activity Videos

	
DRED WINTER - LITTLETON- FINAL.mp4 https://youtu.be/Y_xFL1A0sHw	DRED WINTER - SKIING- FINAL.mp4 https://youtu.be/dq17tnGtZP4
	
DRED WINTER - SNOWMOBILE- FINAL.mp4 https://youtu.be/h9A5tSL6H4Y	DRED WINTER - SNOWSHOE- FINAL.mp4 https://youtu.be/7_ooMlmnl-4

Questionnaire

ASK FOR EACH VIDEO
WinterActivity. How many times have you seen this or a similar ad for New Hampshire?

- ☐ More than three times
- ☐ Two or three times
- ☐ Once
- ☐ Never

ASK FOR EACH AWARE
WinterActivityLA. Where do you recall seeing the ad? Select all that apply.

1. On TV
2. Online
3. Don't recall

ASK AFTER ALL VIDEOS SHOWN
WinterActivityB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK WinterActivityC

WinterActivityC. Why do you feel that way? ________

OOH
BOSTON ONLY Transit Video:

Boston Transit 3 - panel Screen.mov
https://youtu.be/FvtzbsAqydY

Billboards: BOSTON AND HARTFORD ONLY
Billboards.pdf

Billboards_Page_1_Image_0001.jpg

11

Billboards_Page_1_Image_0002.jpg

Billboards_Page_1_Image_0003.jpg

Boston Transit Posters:
Boston Transit Posters.pdf

Boston Transit Posters_Page_1.jpg	Boston Transit Posters_Page_2.jpg	Boston Transit Posters_Page_3.jpg

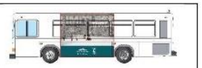
Manchester Bus Rear

Manchester NH Bus Rear.jpg

Manchester Bus Wraps
Manchester NH Bus Wraps.pdf

12

Questionnaire

		
Manchester NH Bus Wraps_Page_1.jpg	Manchester NH Bus Wraps_Page_2.jpg	Manchester NH Bus Wraps_Page_3.jpg

SHOW ALL ON ONE PAGE
WinterOutdoor. Have you seen these or similar ads before now?

☐ I have seen ads like these before now
☐ I have never seen ads like these

WinterOutdoorB. What is your reaction to these ads?

1. Positive
2. Neutral
3. Negative – ASK 27c

WinterOutdoorC. Why do you feel that way? __________

Questions 28-29 will be used to evaluate the messaging of the advertising.

AFTER EACH SEASON IS SHOWN, ASK
28. Given all of these ads together, how much do you think this campaign shows a place…? ROTATE

	Strongly disagree				Strongly agree
Where I would be inspired and invigorated	1	2	3	4	5
Where I could reconnect with my family	1	2	3	4	5
Where I would feel free-spirited	1	2	3	4	5
Where I would be challenged to live life to the fullest	1	2	3	4	5
Where I could uncover new places or things	1	2	3	4	5

29. How much does this campaign make you…?. ROTATE

Want to learn more about things to see and do in the state	1	2	3	4	5
Want to go to the state website or request a brochure from the state	1	2	3	4	5
Want to visit the state	1	2	3	4	5

13

Questions D1-7 detail demographics.

The following questions are for classification purposes only and will help us understand different groups of people.

DEMOS [ALL ON ONE SCREEN & DO NOT FORCE]

The following questions are for classification purposes only so that your responses may be grouped with those of others.

D3. Are you currently …?
Married
Divorced
Widowed
Single/Never married

D4. Including you, how many people live in your household? _______ [IF 1, SKIP TO D6]

D5. How many children under the age of 18 live in your household? ______

D6. Which of the following categories represents the last grade of school you completed?
High school or less
Some college/technical school
College graduate
Post-graduate degree

D7. Which of the following categories best represents your total annual household income before taxes?
Less than $35,000
$35,000 but less than $50,000
$50,000 but less than $75,000
$75,000 but less than $100,000
$100,000 but less than $150,000
$150,000 but less than $200,000
$200,000 or more

D2. Which of the following best describes your racial and ethnic heritage? Are you...?
Select all that apply.
African-American/black
Asian/Pacific Islander
Caucasian/white
Latino/Hispanic
Mixed ethnicity
American Indian
Other, please specify ____________)

D1. Are you …?
Male
Female

14